

# Unlocking Corporate and Foundation Impact Investment

Through Targeted  
Donor-Advised Funds



## Overcoming Obstacles

Private sector investment into a socially or environmentally impactful company or fund may be a difficult path for corporations or foundations despite their alignment with and support for the impact venture's cause.

## Working with LOHAS

By working with LOHAS Advisors through its partnerships with select 501(c)(3) charity donor-advised fund ("DAF") sponsors, your corporation, foundation, or endowment can easily invest in a specific impact venture without the complexity of internally structuring or managing such an investment.

## Enabling Impact Investment

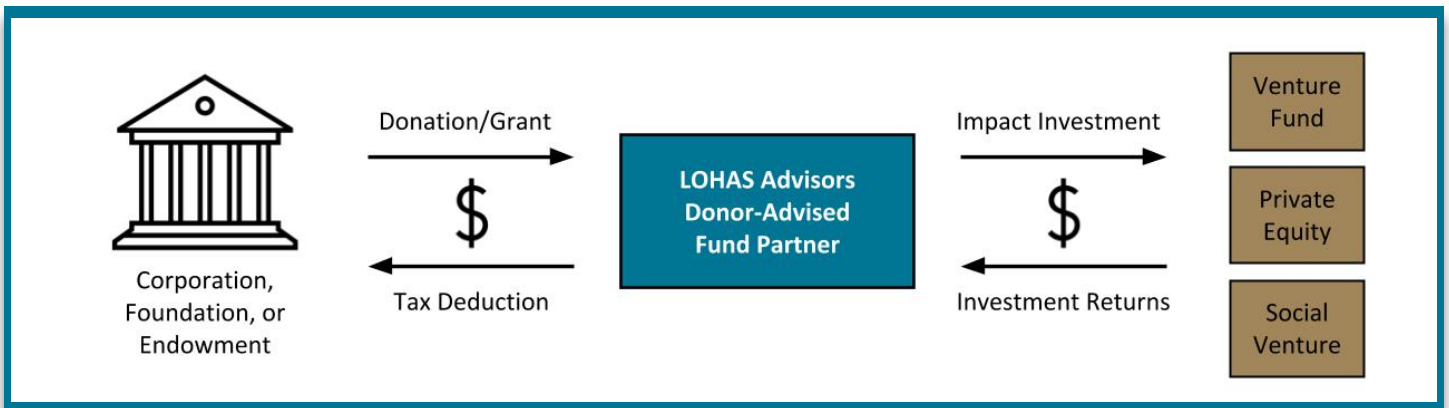
Corporate silos between investment, CSR, and ERG's often limit the flexibility to invest in impact ventures, while foundations are typically better structured to grant funds rather than invest capital.

Nonetheless, both corporations and foundations may recognize the value of aligning with an impactful venture and the financial benefits of being able to reinvest the returns from the investment into similar for-profit causes.



## The process is simple:

1. Identify the venture into which you would like to invest (or a specific cause)
2. Make a corporate donation or foundation grant into a specific LOHAS-partner DAF
3. For corporations, obtain an immediate tax deduction
4. Using your donation or grant, make an equity investment into the selected venture through LOHAS Advisors' designated DAF partner
5. Obtain ongoing reporting from the DAF partner regarding financial and impact investment performance
6. Coordinate with LOHAS and its DAF partner as financial returns from the investment flow back to the DAF for future investment in the same ventures (e.g., next round, fund II, etc.) or similar causes
7. Allow your organization to generate an impact while also enabling a structure for continuity



Because LOHAS and its DAF partners do not act as RIA's or wealth managers, our teams can offer unbiased guidance and support. We work with brand-name (and anonymous) corporations and foundations globally, and our DAF partners provide best-in-class solutions for administration, compliance, structuring, and delivery of impact investment opportunities.

Contact us today ([Info@LOHASadvisors.com](mailto:Info@LOHASadvisors.com)) to learn how to unlock impact investment from your organization.